

## **Allocations Information for the 2002-2003 W-2 and Related Programs Contract**

Allocations information for the W-2 and Related Programs Contract for the 2002-2003 Contract Period is presented on the attached charts. Because Legislative and Governor action is pending on the Biennial Budget Act which covers the 2002-2003 Contract Period, the allocation information is subject to revision. It is presented for W-2 agency information purposes only.

### Base Allocation

The Base Allocation for W-2 and Related Programs is identified by W-2 agency (based on the W-2 agencies for the 2000-2001 W-2 and Related Programs Contract) (see W-2 Base Allocation chart) and includes the following two parts:

- Services/Administration: funding staff salaries and fringe benefits, services, overhead, and other non-benefit allowable expenditures.
- Benefits: funding for CSJs, W-2 T, and Custodial Parent of an Infant payments for the estimated caseload in each W-2 agency.

Note: The benefit amount per case used in the allocation is \$15,830 for twenty-four (24) months or \$660 per month. The \$660 amount is an average calculated from the different benefit amounts for CSJs and W-2 T employment positions and the numbers of each of the benefit case types over calendar year 2000. The rate for the Custodial Parent of an Infant case is the same as a CSJ.

### Allocation Adjustments

In order to determine the Base Allocation, the following adjustments were made:

- 1) Small Agency Supplement: to provide a supplement to the W-2 geographic areas with the smallest allocations to reflect the need for a minimal capacity to deliver the W-2 program and to bring allocations to a \$250,000 minimum level for the combination of both Services/Administration and Benefits;
- 2) Minimum Benefits Amount: to provide an estimated amount for Benefits of \$79,150 (equivalent to five (5) W-2 Payment Cases), to any W-2 geographic area that had fewer than five (5) W-2 Payment Cases in the caseload estimate; and
- 3) Milwaukee: to recognize the increased number case transfers in Milwaukee because the county is divided into multiple geographic areas, as compared to other W-2 geographic areas. One half of the Base Allocation was distributed by caseload and one half was equally distributed among the W-2 geographic areas in that county.

The sum of Services/Administration with any adjustment if applicable for Small Agency Supplement and Benefits allocations is the Base Allocation. Although information is presented for the separate categories of Services/Administration and Benefits, a W-2 agency has the

flexibility to use the Base Allocation for allowable expenses even if the ratio between Services/Administration and Benefits differs from the amounts in the chart.

### Caseload Assumptions

The W-2 agency must serve all applicants seeking assistance. Providing required services is assumed within the Base Allocation although there is no specific “case count” for some activities. It is understood that some applicants will be ineligible for payment benefits or other program services. It is also understood that some applicants will decline further services, or use Job Center resources (e.g. JobNet) to obtain employment without further assistance from the W-2 agency.

For the 2002-2003 W-2 and Related Programs Contract, allocations are based on the following concepts:

- 1) Although the number of cases receiving a payment has been reduced significantly since the start of W-2, there are many cases in addition to W-2 Payment Cases that the W-2 agencies are required to serve;
- 2) The composition of the caseload varies significantly from geographic area to geographic area; and
- 3) Although each case is unique, some categories of cases generally require more effort than other categories of cases.

Caseload numbers for W-2 Payment Cases, W-2 Non-Payment Cases (also referred to as Case Management only), Food Stamp Employment and Training (FSET) Cases, and Child Care Cases were taken from CARES data (EOS Report CT03). For W-2 Payment, and W-2 Non-Payment Cases the average monthly caseload for the period January 2000 through January 2001 was projected for the Contract Period. For FSET and Child Care cases, the average monthly caseload for the period January 2000 through February 2001 was projected for the Contract Period. Because caseload numbers are dynamic, the figures are intended to demonstrate relative workload between agencies, and do not necessarily provide an absolute picture of the projected workload for a W-2 agency.

### Caseload Adjustment for Difficulty Factors

Although many factors can make one case more “difficult” than another (e.g., amount of education or work experience of the participant, language barriers, mental health issues, physical disabilities), the Department has identified two factors that will be used in adjusting the W-2 agency's caseload estimate for allocation purposes.

- 1) Educational attainment - for each case where the adult has not achieved a High School diploma or equivalent; and
- 2) Disabled child or adult – for each case where the adult or a child has a disability as identified in CARES.

A point-in-time report (FCB 2001) was used to determine the number of cases with either or both of the characteristics described above. Regardless of the size of the agency's caseload, each occurrence of either of the two factors above will increase that W-2 agency's caseload by

one case to establish an Adjusted Caseload. The Adjusted Caseload is used to distribute available Services/Administration funds proportionately among the W-2 agencies. See W-2 Base Allocation – Caseload Data chart.

#### Funding Level Supplement(s)

At any time(s) during the Contract Period and for any uses allowed by the Department for this Contract, a W-2 agency may supplement the funding level available for this Contract with funding already earned by the W-2 agency for TANF restricted-use funding (referred to as “Community Reinvestment”). The amount(s) and frequency of any supplement(s) are at the discretion of the W-2 agency. The W-2 agency will report any supplement(s) to the Department in accordance with the Department’s fiscal policies and procedures.

#### Funding Outside the Base Allocation

Other funds available to W-2 agencies but not reflected in the Base Allocation for the 2002-2003 W-2 Contract and Related Programs include the following:

- Workforce Advancement and Attachment funds (see JAL & WAA Allocations chart);
- Job Access Loan funds (see JAL & WAA Allocations chart);
- Children First funds (based on a local decision regarding whether the W-2 or child support agency will administer the program);
- Employment Skill Advancement Program funds (a total of \$200,000 for the Contract period is available to W-2 agencies on a first come, first served basis until funds are fully spent);
- Supplemental Food Stamp Employment Training funds to match local funds are available at the request of the W-2 agency as long as the W-2 agency is a county or tribe, based on federal regulations. (The requirement to serve FSET cases is covered by the Base Allocation);
- 100 percent Federally Funded Food Stamp Employment Training funds for Able-bodied Adults without Dependents (ABAWDs) is available to W-2 agencies as long as the state receives 100 percent Federally Funded FSET funding; (The requirement to serve FSET cases including ABAWDs is covered by the Base Allocation);
- Contracted Child Care funds (based on a specific plan submitted by the W-2 agency for the Department’s approval);
- Community Reinvestment funds earned under the 1997-1999 Wisconsin Works (W-2) Implementation Contract approved by the Department for carryover into the 2002-2003 Contract Period (Funds approved for carryover must be spent by June 30, 2002.);
- Community Reinvestment funds earned under the 2000-2001 Wisconsin Works (W-2) and Related Programs Implementation Contract;
- Start-up funds for new W-2 agencies or existing W-2 agencies operating in different geographic areas (based on available funds).

#### Allocation Method for Workforce Advancement and Attachment funds for W-2 agencies

In accordance with Wisconsin Statutes, case counts for W-2 case management cases, FSET, Child Care, diversions from W-2 and non-custodial parents were used in the allocation formula.

#### Allocation Method for Job Access Loan Funds for W-2 agencies

Job Access Loan funds were allocated based on a proportion of the W-2 Base Allocation Contract plus additions for usage of JAL funds under the 2000 - 2001 JAL contract.

#### Funding that was part of the 2000-2001 W-2 and Related Programs Implementation Contract that will not be a part of the 2002-2003 W-2 and Related Programs Contract

The philosophical direction of the W-2 program for the 2002-2003 Contract Period emphasizes retention and advancement in the workplace. A distinction is being made between entitlement programs and non-entitlement work-based programs. Entitlement programs are being aligned with the Income Maintenance (IM) contract and the non-entitlement work-based programs are being aligned with the W-2 contract. For this reason, the responsibilities for and funding for eligibility determination and case processing for entitlement programs (i.e., Food Stamps and Medicaid) is removed from the W-2 Contract beginning January 1, 2002. The numbers presented in the following charts reflect the removal of funding for Food Stamp and Medicaid eligibility determination processing.

#### Child Care Administrative Funding

The Base Allocation for W-2 agencies includes funding for determining eligibility for subsidized child care. That responsibility has been a requirement of the W-2 agencies since the first W-2 contract and continues to be a requirement in the 2002-2003 contract. A statutory change is needed in order to assign other child care administrative activities to the W-2 agencies. The Department values child care as an integral part of the employment and training services it delivers. No change in allocations has been reflected on the attached charts for the movement of child care administrative responsibilities from the IM agencies to the W-2 agencies.

**W-2 Base Allocation – Caseload Data**  
**April 27, 2001**

W-2 Agency by Geographic Area	W-2 Pay- ment	W-2 non Pay- ment	FSET	Child Care	W-2 AG less than HS	W-2 AG-With Disabled Child or Adult	Adjusted Caseload
Adams Co	4	6	13	47	2	1	73
Ashland Co	5	1	6	88	3	1	104
Bad River Tribe	6	2	3	29	1	1	42
Barron Co	5	3	17	133	8	1	167
Bayfield Co	3	1	8	30			42
Brown Co	18	16	41	685	17	3	780
Buffalo Co	2	4	8	28	1		43
Burnett Co	2	2	4	24			32
Calumet Co	6	4	2	70	7		89
Chippewa Co	12	9	5	170	13	2	211
Clark Co	4	4	20	32	2	1	63
Columbia Co	9	16	10	99	4	3	141
Crawford Co	1			44			45
Curtis & Assoc. Waukesha	38	33	49	509	23	4	656
Dane Co	294	194	119	1,478	212	73	2,370
Dodge Co	19	24	18	216	16	8	301
Door Co	6	7	5	77	4	1	100
Douglas Co	27	26	66	203	20	5	347
Dunn Co	19	24	10	73	4	2	132
Eau Claire Co	16	19	42	376	18	8	479
Fond du Lac Co	43	21	21	271	23	16	395
Forward Service Florence	2	3	3	11	5	1	25
Forward Service FOV	10	8	24	133	16	2	193
Forward Service Kewaunee	4	2	3	33	1		43
Grant (SW Consortium)	11	12	21	266	1	6	317
Green Lake Co	2	3	12	41		1	59
Iron Co	2	2	1	21		2	28
Jackson Co	4	1	24	29	3	2	63
Jefferson Co	7	10	4	91	5	1	118
Kaiser Group Walworth	27	10	19	136	10	4	206
Kenosha Co	209	149	167	616	147	52	1,340
La Crosse Co	22	18	22	428	13	7	510
Langlade Co	11	7	24	59	13	3	117
Lincoln Co	5	2	15	75	2	1	100
Manitowoc Co	2	3	4	100	1	2	112
Marathon Co	43	24	34	387	42	13	543
Marinette Co	4	1	17	62	1	1	86
Marquette Co	3	1	6	38	6	3	57
Menominee Co	9	6	10	40	5		70
Milwaukee – ESI	1748	1,089	709	3,478	1,538	277	8,839
Milwaukee – MAXIMUS	1,035	534	470	1,540	963	136	4,678
Milwaukee – OIC-GM	1,006	655	229	1,617	839	149	4,495

<b>W-2 Agency by Geographic Area</b>	<b>W-2 Pay- ment</b>	<b>W-2 non Pay- ment</b>	<b>FSET</b>	<b>Child Care</b>	<b>W-2 AG less than HS</b>	<b>W-2 AG-With Disabled Child or Adult</b>	<b>Adjusted Caseload</b>
Milwaukee – UMOS	793	552	403	949	715	129	3,541
Milwaukee – YW Works	632	418	356	987	495	86	2,974
Oconto Co	3	1	16	90	2		112
Oneida Tribe	11	17	4	52	11	1	96
Outagamie Co	34	46	20	359	31	8	498
Ozaukee Co	2		3	118	1	1	125
Pepin Co			3	17			20
Pierce Co	4	3	1	71	1	1	81
Polk Co	7	17	13	114	8		159
Portage Co	5	10	5	180	2	2	204
Price Co	5	5	13	73	2	4	102
Racine Co	115	18	120	726	61	30	1,070
Rock Co	105	31	35	531	55	21	778
Rusk Co	2	3	7	43	2		57
Sauk Co	13	5	23	103	6	2	152
Sawyer Co	4	6	4	115			129
Shawano Job Center	15	11	8	91	8	3	136
Sheboygan Co	24	19	16	165	23	8	255
St. Croix Co	8	11	5	85	2	3	114
Taylor Co	2	3	3	34	5		47
Trempealeau Co	5	3	6	95	1	4	114
Vernon Co	5	2	8	42			57
Washburn Co	3	3	4	44		1	55
Washington Co	13	12	18	216	6	3	268
Waupaca Co	22	18	9	73	11	10	143
Waushara Co		1	9	54			64
Winnebago Co	44	43	26	444	31	7	595
Wood Co	29	13	48	246	20	6	362
Workforce Conn Juneau	17	24	10	58	8	5	122
Workforce Conn Monroe	21	16	13	119	8	2	179
<b>Totals</b>	<b>6,648</b>	<b>4,267</b>	<b>3,494</b>	<b>20,177</b>	<b>5,504</b>	<b>1,130</b>	<b>41,220</b>

For W-2 Payment, and W-2 Non-Payment Cases the average monthly caseload for the period January 2000 through January 2001 was projected for the Contract Period.

For FSET and Child Care cases, the average monthly caseload for the period January 2000 through February 2001 was projected for the Contract Period.

For the adjustment for difficulty factors a point-in-time count for February 2001 was projected for the Contract Period.

**W-2 Base Allocation**  
**April 27, 2001**

<b>W-2 Agency by Geographic Area</b>	<b>Services/ Administration</b>	<b>Benefits @ 15,830 per Case</b>	<b>Small Agency Supplement</b>	<b>Base Allocation</b>
Adams Co	392,520	79,150		471,670
Ashland Co	559,207	79,150		638,357
Bad River Tribe	225,834	94,980		320,814
Barron Co	897,958	79,150		977,108
Bayfield Co	225,834	79,150		304,984
Brown Co	4,194,054	284,940		4,478,994
Buffalo Co	231,211	79,150		310,361
Burnett Co	172,064	79,150		251,214
Calumet Co	478,552	94,980		573,532
Chippewa Co	1,134,545	189,960		1,324,505
Clark Co	338,751	79,150		417,901
Columbia Co	758,156	142,470		900,626
Crawford Co	241,965	79,150		321,115
Curtis & Assoc. Waukesha	3,527,307	601,540		4,128,847
Dane Co	12,743,472	4,654,020		17,397,492
Dodge Co	1,618,475	300,770		1,919,245
Door Co	537,699	94,980		632,679
Douglas Co	1,865,816	427,410		2,293,226
Dunn Co	709,763	300,770		1,010,533
Eau Claire Co	2,575,579	253,280		2,828,859
Fond du Lac Co	2,123,912	680,690		2,804,602
Forward Service Florence	134,513	79,150	36,337	250,000
Forward Service FOV	1,037,760	237,450		1,275,210
Forward Service Kewaunee	231,211	79,150		310,361
Grant (SW Cosortium)	1,704,601	395,750	25,576	2,125,927
Green Lake Co	317,243	79,150		396,393
Iron Co	150,655	79,150	20,195	250,000
Jackson Co	338,751	79,150		417,901
Jefferson Co	634,485	110,810		745,295
Kaiser Group Walworth	1,107,660	427,410		1,535,070
Kenosha Co	7,205,170	3,308,470		10,513,640
La Crosse Co	2,742,266	348,260		3,090,526
Langlade Co	629,108	174,130		803,238
Lincoln Co	537,699	79,150		616,849
Manitowoc Co	602,223	79,150		681,373
Marathon Co	2,919,707	680,690		3,600,397
Marinette Co	462,421	79,150		541,571
Marquette Co	306,489	79,150		385,639

<b>W-2 Agency by Geographic Area</b>	<b>Services/ Administration</b>	<b>Benefits @ 15,830 per Case</b>	<b>Small Agency Supplement</b>	<b>Base Allocation</b>
Menominee Co	376,389	142,470		518,859
Milwaukee – ESI	45,664,715	27,670,840		73,335,555
Milwaukee – MAXIMUS	22,253,019	16,384,050		38,637,069
Milwaukee – OIC-GM	21,990,559	15,924,980		37,915,539
Milwaukee – UMOS	21,111,629	12,553,190		33,664,819
Milwaukee – YW Works	20,861,567	10,004,560		30,866,127
Oconto Co	602,223	79,150		681,373
Oneida Tribe	516,191	174,130		690,321
Outagamie Co	2,677,742	538,220		3,215,962
Ozaukee Co	672,124	79,150		751,274
Pepin Co	107,611	79,150	63,239	250,000
Pierce Co	435,536	79,150		514,686
Polk Co	854,942	110,810		965,752
Portage Co	1,096,906	79,150		1,176,056
Price Co	548,453	79,150		627,603
Racine Co	5,753,382	1,820,450		7,573,832
Rock Co	4,183,300	1,662,150		5,845,450
Rusk Co	306,489	79,150		385,639
Sauk Co	817,303	205,790		1,023,093
Sawyer Co	693,632	79,150		772,782
Shawano Job Center	731,271	237,450		968,721
Sheboygan Co	1,371,133	379,920		1,751,053
St. Croix Co	612,977	126,640		739,617
Taylor Co	252,719	79,150		331,869
Trempealeau Co	612,977	79,150		692,127
Vernon Co	306,489	79,150		385,639
Washburn Co	295,735	79,150		374,885
Washington Co	1,441,034	205,790		1,646,824
Waupaca Co	768,910	348,260		1,117,170
Waushara Co	344,128	79,150		423,278
Winnebago Co	3,199,310	696,520		3,895,830
Wood Co	1,946,471	459,070		2,405,541
Workforce Conn Juneau	655,993	269,110		925,103
Workforce Conn Monroe	962,482	332,430		1,294,912
<b>Totals</b>	<b>221,639,978</b>	<b>106,425,090</b>	<b>145,347</b>	<b>328,210,415</b>



**JAL & WAA Allocations**  
**April 27, 2001**

<b>W-2 Agency by Geographic Area</b>	<b>JAL Allocation</b>	<b>WAA Allocation</b>
Adams Co	1,746	30,249
Ashland Co	3,925	41,014
Bad River Tribe	1,269	19,740
Barron Co	3,343	62,801
Bayfield Co	929	22,560
Brown Co	13,836	221,206
Buffalo Co	2,324	22,303
Burnett Co	4,356	20,509
Calumet Co	3,043	32,300
Chippewa Co	4,770	66,902
Clark Co	3,479	30,249
Columbia Co	2,900	49,217
Crawford Co	1,016	27,942
Curtis & Assoc. Waukesha	35,160	276,058
Dane Co	67,370	594,917
Dodge Co	8,328	95,610
Door Co	1,941	39,220
Douglas Co	15,062	96,123
Dunn Co	13,802	46,910
Eau Claire Co	20,375	135,596
Fond du Lac Co	17,065	159,689
Forward Service Florence	729	15,383
Forward Service FOV	6,785	92,284
Forward Service Kewaunee	946	20,253
Grant (SW Consortium)	11,038	155,860
Green Lake Co	1,957	26,404
Iron Co	729	17,177
Jackson Co	1,156	26,661
Jefferson Co	2,879	54,598
Kaiser Group Walworth	7,950	74,592
Kenosha Co	111,671	367,818
La Crosse Co	16,253	148,155
Langlade Co	2,342	38,708
Lincoln Co	3,283	38,964
Manitowoc Co	2,098	53,830
Marathon Co	13,603	133,801
Marinette Co	1,662	54,856
Marquette Co	1,327	27,430
Menominee Co	1,592	27,942

<b>W-2 Agency by Geographic Area</b>	<b>JAL Allocation</b>	<b>WAA Allocation</b>
Milwaukee - ESI	504,731	1,700,418
Milwaukee - MAXIMUS	291,940	803,046
Milwaukee - OIC-GM	214,664	806,891
Milwaukee - UMOS	183,457	631,057
Milwaukee - YW Works	144,505	618,498
Oconto Co	3,634	44,090
Oneida Tribe	1,906	31,018
Outagamie Co	12,570	137,646
Ozaukee Co	2,428	46,653
Pepin Co	729	16,152
Pierce Co	2,758	36,401
Polk Co	12,155	51,523
Portage Co	14,354	73,823
Price Co	2,452	37,939
Racine Co	23,109	343,213
Rock Co	35,944	197,368
Rusk Co	2,652	29,224
Sauk Co	2,358	60,751
Sawyer Co	14,076	59,469
Shawano Job Center	5,055	49,473
Sheboygan Co	11,232	79,206
St. Croix Co	7,988	42,552
Taylor Co	2,411	22,816
Trempealeau Co	4,380	40,502
Vernon Co	2,003	32,043
Washburn Co	3,531	30,505
Washington Co	11,051	81,256
Waupaca Co	7,043	51,267
Waushara Co	1,278	32,812
Winnebago Co	12,268	155,845
Wood Co	30,474	95,610
Workforce Conn Juneau	4,024	39,477
Workforce Conn Monroe	12,801	55,625
<b>Totals</b>	<b>2,000,000</b>	<b>10,000,000</b>